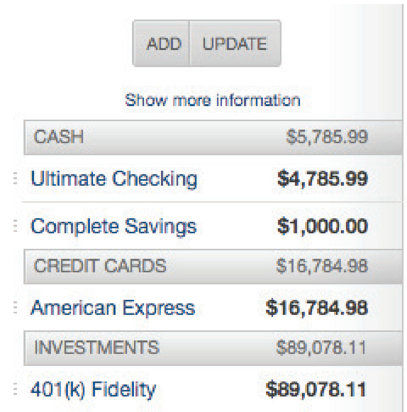
My Money Quick Start

Personal Financial Mangement Tool

Getting the most out of our Personal Financial Mangement tool, My Money, does not require a lot of time. It takes just a few minutes to set up a few of the tools in My Money to gain a better view of your financial situation.

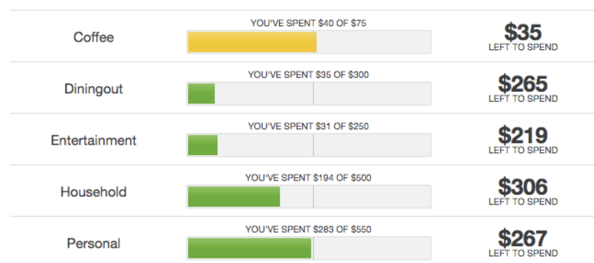
Dashboard

1. Add accounts from other financial institutions. Your primary accounts will automatically be added the first time you use My Money.
2. When you add accounts, your transactions and balances will update accordingly.
3. Your transactions will categorize themselves with ‘tags’. To personalize these categories, select the transaction and edit the tag.



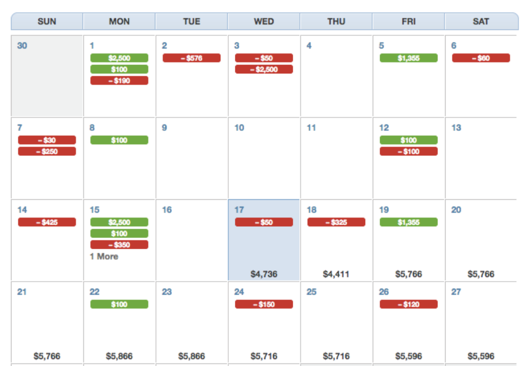
Spending Targets

1. Navigate to the Budget tab to create Spending Targets and begin tracking spending by category.
2. Click the ‘Add a new spending target’ button and follow the prompts to begin track your spending by category. Popular categories to track are groceries, dining out and household.



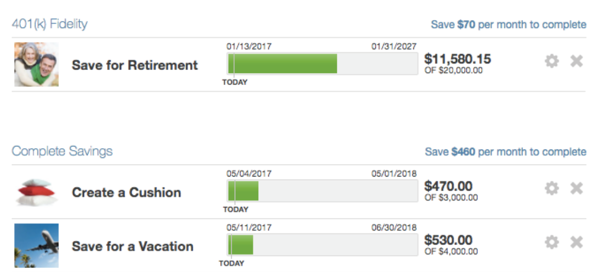
Cashflow

1. Navigate to the Cashflow tab to see your projected day-to-day cash flow.
2. Add Incomes & Bills like your paycheck, rent or utilities to more accurately forecast your cash flow.



Goals

1. Follow the prompts in the Goals tab to create one or more financial goals.
2. Select from the available savings and payoff goal types to begin tracking your progress towards your financial aspirations.



Congratulations!

You’ve completed the Quick Start set-up. Now continue to explore and monitor your finances!

If you have any questions contact our Client Care team.